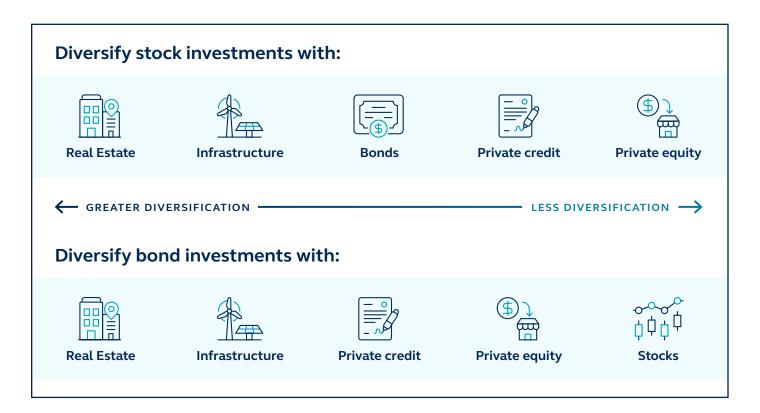


Investment education

## Diversifying stocks and bonds with private investments

The key to diversification isn't how many investments you own, it's how different they are. Stocks and bonds alone may not be enough to fully diversify portfolios, especially with both markets rising and falling at the same times in recent years. Private investments are historically less sensitive to the factors driving traditional markets, so they can bring added diversification to your wealth management plan. Examples include commercial and residential real estate, infrastructure projects like data centers, equity interest in privately held companies, and direct lending to businesses.



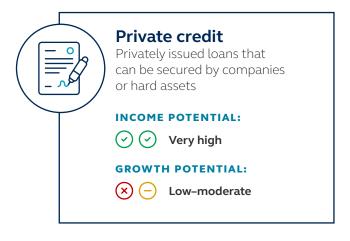
Source: Based on correlation analysis from Bloomberg S&P 500 Total Return Index, NFI-ODCE (Gross, Value Weighted) Index. Data from Q3 2006 to Q3 2024. Indices are unmanaged and do not take into account fees, expenses, and transaction costs and it is not possible to invest in an index.

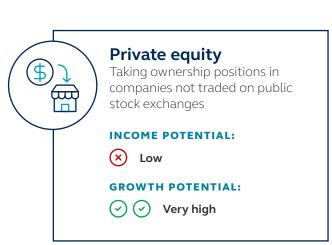
## Put private investments to work toward your goals

Real estate and private markets aren't just for diversifying portfolios. You can also use them to pursue important life goals like potentially generating income and growing wealth









## Ready to take action?

Talk to your financial professional. Together, you can determine which private investments might be right for your portfolio.

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